

Please complete accurately, using CAPITAL/BLOCK LETTERS in blue or black ink. Tick (✓) blocks where appropriate.

THE FOLLOWING SECTION IS TO BE COMPLETED BY THE EMPLOYER IN THE EVENT OF AN EMPLOYEE'S RESIGNATION, RETRENCHMENT OR DISMISSAL.

ORION EVERGREEN EASY BENEFIT PLAN

PLEASE FAX AND THEN POST THE COMPLETED FORM AND SUPPORTING DOCUMENTS TO:

Orion

Claims Department
Old Mutual SuperFund-Orion
PO Box 728
Cape Town 8000
Fax: 021 509 5770/1

Evergreen

Claims Department
Old Mutual SuperFund-Evergreen
PO Box 167
Cape Town 8000
Fax: 0860 383 848

Easy Benefit Plan

Claims Department
Old Mutual SuperFund-Easy Benefit Plan
PO Box 167
Cape Town 8000
Fax: 0860 383 848

PARTICIPATING EMPLOYER BUSINESS DETAILS

Name of employer

Telephone number Code No.

Cellphone number

Email address

Contact branch

PARTICIPATING EMPLOYER SCHEME DETAILS

Scheme code

Member's SuperFund reference number

MEMBER'S PERSONAL DETAILS (please complete in full)

Title Surname

First names

RSA ID Date of birth

Income tax number (compulsory where member has worked in South Africa)

Passport number (where no South African ID number is available)

Country of issue of passport

Telephone number* Code No. Cellphone number

Email address*

Residential address

Unit number Complex name

Street number

Street name

Suburb

City/Town Code

Postal address (complete only if different from residential address)

Code

* Insert the details where the member will be contactable after leaving this employer.

MEMBER EXIT DETAILS

Date of withdrawal

Final contributing month

Amount of final contribution:

Employee

R

Employer

R

TYPE OF WITHDRAWAL

Note:

- Be aware of the Rules of SuperFund, as the member may already be eligible for retirement benefits.

Resignation Retrenchment Dismissal

REMUNERATION DETAILS

Final GROSS **annual** pensionable salary at date of exit R

Final GROSS **annual** taxable salary at date of exit R

OFFSHORE SERVICE

Was any period of service served outside RSA during membership to this Fund? YES NO

If "YES", complete the table below and attach proof of offshore service.

Country	Period from	Period to

PRIOR CLAIM

Is any Prior Claim payable? YES NO

If "YES", complete a Prior Claim Form and attach it to this form.

You can get hold of the Prior Claim Form online at www.oldmutual.co.za/superfund/forms, or by phoning the SuperFund service centre on 0860 20 30 40.

DECLARATION BY PARTICIPATING EMPLOYER

I, the undersigned, hereby certify that all particulars furnished in this form and accompanying documentation are true and correct.

Signed on behalf of employer

Designation

Date

COMPANY STAMP

THE FOLLOWING SECTION IS TO BE COMPLETED BY THE MEMBER.

BENEFIT OPTIONS WHEN LEAVING YOUR EMPLOYER DUE TO RESIGNATION, RETRENCHMENT OR DISMISSAL

Some important information

- The SuperFund Rules allow for your retirement savings to:
 - remain invested with SuperFund thereby making you a Preserver Member;
 - be transferred to another approved pension, provident, pension preservation, provident preservation or retirement annuity fund; or
 - be paid in cash (which is taxable in excess of limits as per the Income Tax Act);
 - processed as a part cash/part transfer benefit.

Please note the following in respect of transfers to preservation funds:

- A pension fund benefit can only be transferred to a pension preservation fund.
- A provident fund benefit can be transferred to a pension preservation or provident preservation fund.

The option that you select will have an impact on your retirement savings. It is therefore important to obtain assistance before selecting your option. You can obtain assistance by discussing the matter with your own Financial Adviser. If you do not have your own Financial Adviser, contact 0860 388873 (Sharecall) or email membersupportservices@oldmutual.com and a service consultant will put you in contact with an accredited Old Mutual Financial Adviser.

- Please note the following important information with regard to the taxation of withdrawal benefits that became payable on or after 01 March 2009: (i.e. date of resignation, dismissal, retrenchment is on or after 01 March 2009)
 - Any withdrawal benefit taken in cash will be taxed on a cumulative basis.
 - Any withdrawal benefit taken in cash will reduce the tax-free amount available on your future retirement.
- Consult your SuperFund Withdrawal Guide for more information.

BENEFIT PAYMENT OPTIONS (continued)

- NB: In terms of the Rules of the SuperFund, if the Fund is unable to complete payment of your benefit due to:
 - (i) an election not having been exercised in terms of the Rules of the Fund, OR
 - (ii) the transfer option having been elected, but the Receiving Fund's details not having been supplied, within a period of 60 days, after leaving your employer:
 - Your SuperFund Preserver Membership will be activated automatically; or
 - If SuperFund has to make a deduction for a housing loan and/or employer lien:
 - i) the balance of your benefit will be transferred to a Trustee elected preservation fund, or
 - ii) if the Fund does not have all your personal details to transfer your benefit to the Trustee elected preservation fund, your benefit will remain in SuperFund in an investment fund that preserves capital.

Please note the following important information about Preserver Membership.

- SuperFund Preserver Membership is only available to members of Old Mutual SuperFund.
- If a deduction has been made against your benefit for a housing loan and/or employer lien, SuperFund Preserver Membership is not available to you. However, you can still keep the balance of your retirement savings intact by moving your benefit to another retirement fund.
- Please refer to www.oldmutual.co.za/preserver for more information on SuperFund Preserver or phone Member Support Services at 0860 38 88 73.
- **Retrenchment Benefit:** You may get a tax break if you take your retrenchment benefit as a cash withdrawal benefit. This tax break is no longer available if you become a Preserver Member or if you transfer to a preservation fund. For more information, contact the Old Mutual SuperFund Service Centre at 0860 20 30 40.

BENEFIT OPTIONS – SELECT ONE OF THESE OPTIONS

- Preserver in-fund preservation.** Keep your retirement savings invested and growing.
- Transfer full benefit to another approved Fund. Attach copy of proposal or application form.**
 - Protector Preservation Fund (Guaranteed Option – Absolute Stable Growth)
 - Other approved fund
 - Full name of other approved fund
- Part Cash/Part Transfer**
 - Insert Cash Amount or percentage required to be encashed, and complete the Method of Payment section.
 - Please note: Any cash amount requested will be reduced by any tax payable on it.**
 - R OR %
 - Transfer the remainder of the benefit to another approved Fund (including a Preservation Fund). Attach copy of proposal or application form.**
 - Full name of approved fund
- Total cash payment:** Complete the Method of Payment section.
 - Please note: Any cash amount requested will be reduced by any tax payable on it.**

Conversion Option (if selected by the employer as a benefit option)

Do you wish to utilise the Conversion Option in respect of your Group Life Cover? YES NO

Please contact your Financial Adviser for further information.

If you don't have your own Financial Adviser, contact 0860 388 873 (Sharecall) or email membersupportservices@oldmutual.com and a service consultant will put you in contact with an accredited Old Mutual Financial Adviser.

METHOD OF PAYMENT FOR CASH

Name of account holder

Name of bank Name of branch

Account number Bank branch code

Type of account Cheque Savings

Note: We regret that payment by cheque is not allowed.

DECLARATION BY MEMBER

The options in terms of the Rules of the SuperFund have been fully explained to me and I confirm that I fully understand the implications of the choices elected. I also certify that all particulars furnished in this form and accompanying documentation are true and correct.

Member's signature

Date



Old Mutual is a Licensed Financial Services Provider